

QCIS User Guide

Q5i “Personal” ANALYST

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QCIS Overview

QCIS software is used by the California Department of Social Services (CDSS) and its Performance Measurement Counties (PMC) to capture Food Stamps QC and TANF data, make reports and transmit data to federal agencies. The software can also be used for surveys and questionnaires.

QCIS is available on two platforms:

Windows Q5 Entire application runs on each user's PC ("fat Client").

Web-based Q5i Application runs from a web server and is accessed by the user via a browser ("thin client").

Each QCIS platform comes in two "Editions":

Enterprise The entire application runs on a central server and is accessed via network connections (LAN or private TCP/IP Intranet).

Personal The entire application, including the Q5i database, runs on each worker's PC/laptop. Case records move between the different PC databases via modem, network connection or diskette.

A QCIS installation can be used in the following configurations:

100% Enterprise All users run QCIS via network connections 100% of the time.

100% Personal The application and the databases reside on each user's PC and no network connections are needed. The Personal Edition is especially good for users with laptops.

Enterprise and Personal The system is primarily the Enterprise Edition and works exclusively via network connections. However, there is a "check out" facility which allows cases to leave the Enterprise and held in suspense until checked back in. Typically a review is checked out to a laptop to be worked on away from the Enterprise. Note: this configuration is the most expensive and hardest to maintain.

There are three user authorization levels within QCIS:

CO Central Operations, the top of the chain of command. This group starts with a new Sample (group of cases to complete), distributes the work down the chain of command, receives completed work, generates reports and graphs and finally sends information outside the organization.

REMOTE These are subordinate offices reporting to Central Operations.

ANALYST The workers who perform reviews and capture their observations.

This tutorial is written for Q5i Personal, ANALYST level

Q5i Terminology

The terms “Case” and “Review” are synonymous in this document.

Q5i Information is collected in increasing larger units, the smallest being *Item*, the largest being *Profile*:

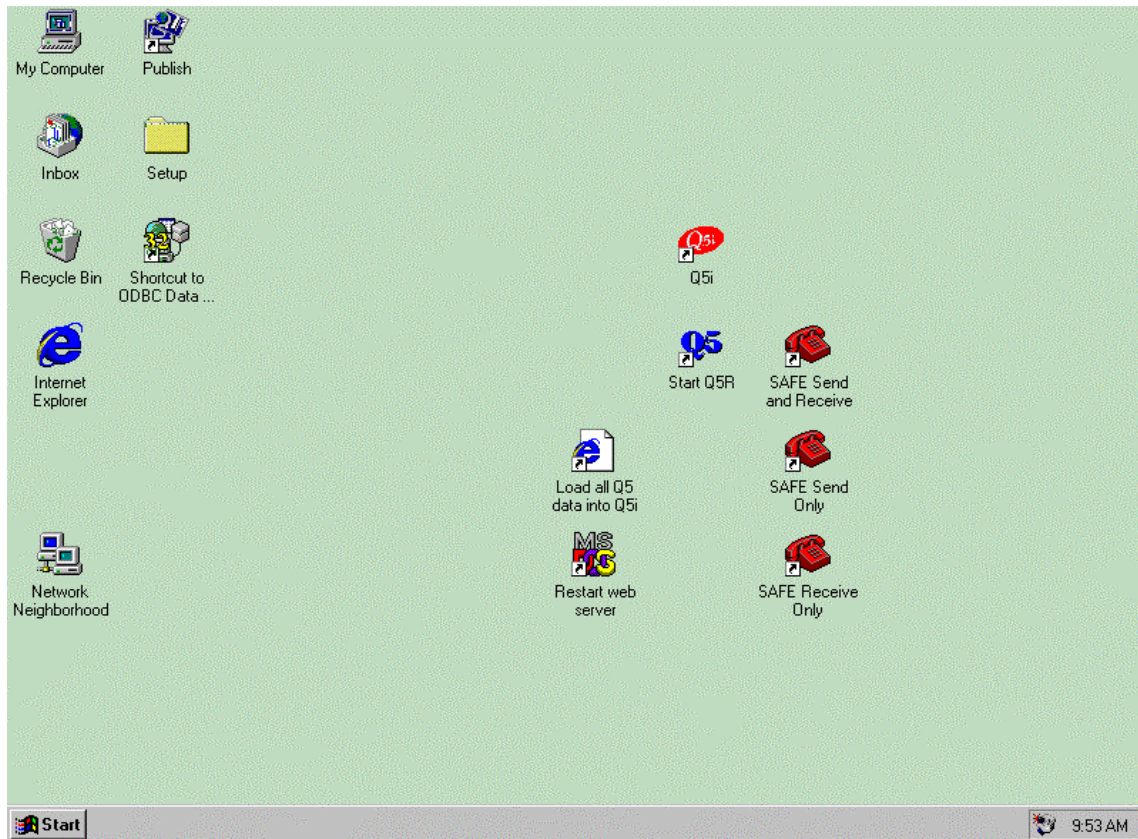
<i>Item</i>	A piece of data to be captured. Examples include Food Stamp Coupon Amount, Sex code and Education code. An Item is analogous to a database field.
<i>Class</i>	A group of Items which will display together on the screen. Examples are: Income, Education and Revenue.
<i>Profile</i>	A universe of QCIS Classes and Items. Existing Profiles include Medicaid QC, Food Stamps QC, TANF, a county's QA and a PC hardware and software survey . QCIS allows an unlimited number of Profiles.

Item types:

<u>Code</u>	A discreet group of values (1, 2, 9..., M, F, U), which can include a blank. CODE table entries determine valid codes for each code Item. Data capture is facilitated by Code pull down lists.
<u>Dollar</u>	Dollars and pennies (235.50). Each Dollar Item has a value range entry to validate data capture.
<u>Date</u>	A valid date in the format mm/dd/yyyy. QCIS will not allow non-valid dates to be entered.
<u>Count</u>	An integer number (12, 1000). Each Count Item has a value range entry to validate data capture.
<u>Y/N</u>	A “Y” (Yes) or “N” (No).
<u>Text</u>	Up to 30 characters of letters and/or numbers (comments are stored outside of Items).

The PC Desktop

The Q5i install program puts seven shortcut on the desktop (see below).

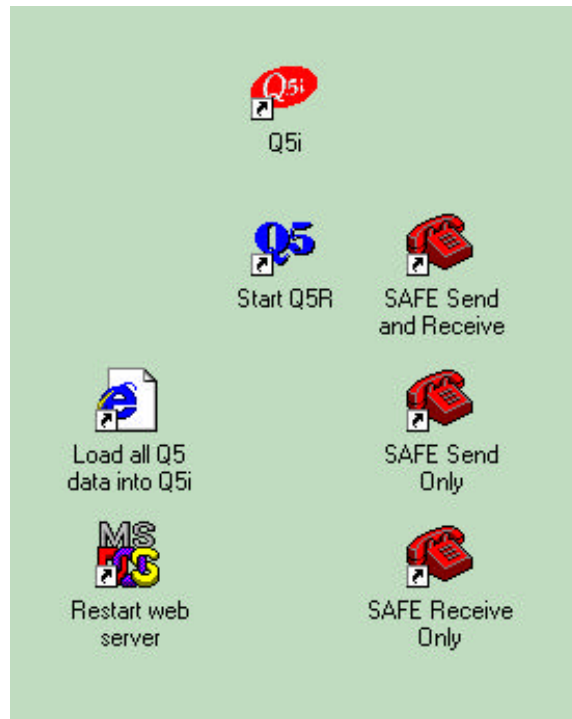


1. Q5i application start up
2. Q5R application start up
3. SAFE - Send and Receive utility program start up (requires modem connection)
4. SAFE - Send utility program start up (requires modem connection)
5. SAFE - Receive utility program start up (requires modem connection)
6. Q5 Data to Q5i Conversion Utility (used once - can be removed)
7. Restart Web server (for technical support use)

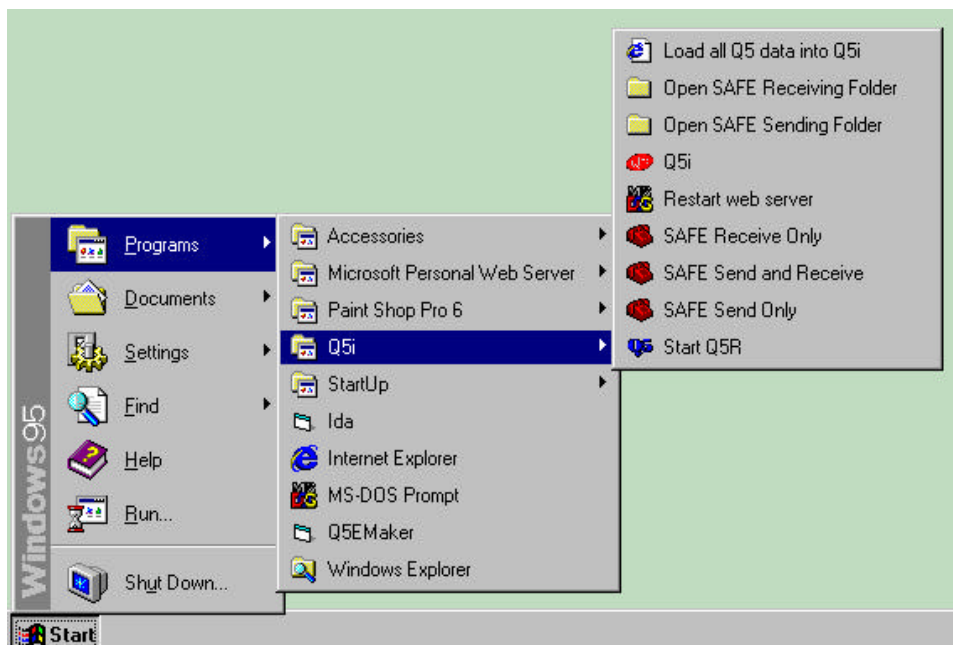
Entering Q5i

Q5i, like any Windows' application, can be started via a shortcut on the desktop...

❶ Double click on Q5i icon



...or from the Start Menu.



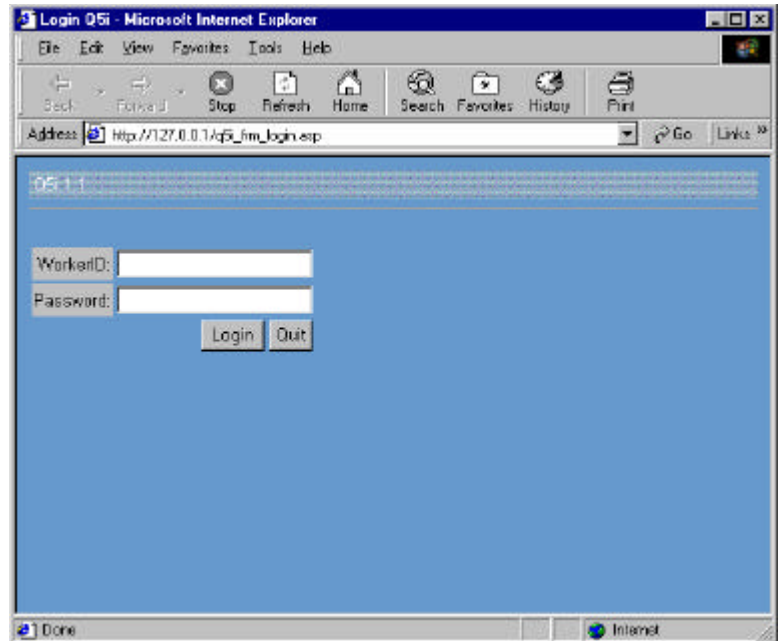
❷ Select Q5i

Entering Q5i - Continued Application Icons

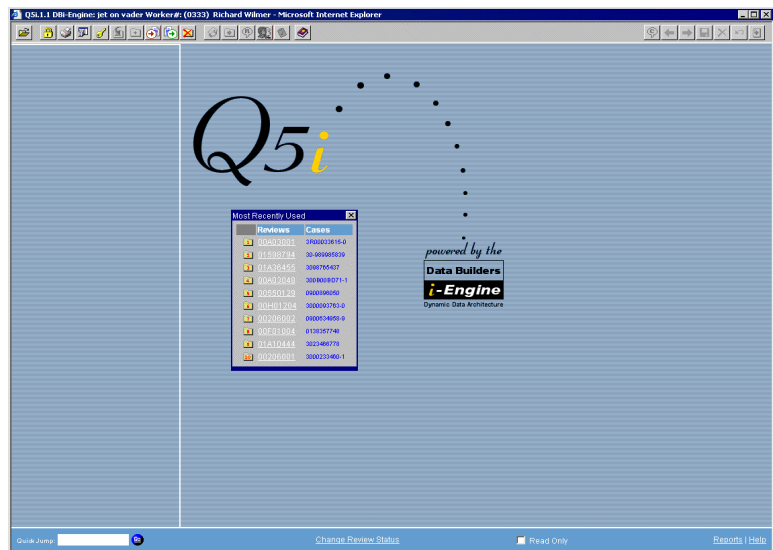
After starting up Q5i, the browser will activate and display the Q5i Login Screen.

- ❶ Enter Worker ID number
- ❷ Enter Password, then click Login

Or, click “Quit” to exit Q5i

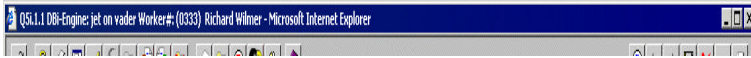


A successful Login will bring up Q5i's Opening Screen...



Q5i Application Icons

Application icons at the top of the Screen are active when colored (not light grey) and...



are broken into three groups:

① Universal (work at all levels)



Icons, left to right:

- Open Review
- Lock Application
- Report
- Export to Q5i
- Change Password
- Load Sample (inactive)
- Add a Review (inactive)
- Receive Review(s)
- Send Review(s)
- Delete a Review

② Review-specific



Icons, left to right:

- Drop/Undrop
- Close a Review
- Review Comments
- Maintain People
- Run Edits
- Help (always active)

③ Class-specific



Icons, left to right:

- Class Comments
- Move to Previous Record
- Move to Next Record
- Save
- Delete
- Undo
- Close Class

Receiving Reviews from Another Q5i User

Reviews can come to a Q5i “Personal” ANALYST PC via 1) SAFE (electronic transmission via modem) or 2) Diskette.

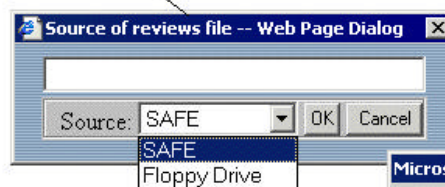
Incoming Q5i records can be read into the worker’s system via the *Source of Reviews* form.

- 1 Click on the icon with the Arrow entering the Page



- 2 Select:

SAFE (modem is required to connect to SAFE).



~~ or ~~

Flopp

y

Drive

Before performing Step 3, place the diskette with the incoming records into the floppy drive (ie: A:).



- 3 Once appropriate selection is made click on “OK” to proceed or “Cancel” to stop without any action taking place.
- 4 When Receive is complete, information message displays with the number of cases received.

Opening a Case/Review Using “Quick Jump”

There are three ways to open a case from the Opening window. The first method discussed is the “Quick Jump” where the user enters a case number which then opened. Quick Jump is found at the bottom left of the Opening Screen.

A screenshot of a software interface showing a "Quick Jump:" label followed by a text input field containing the alphanumeric string "00H01101". To the right of the input field is a blue circular button with a white "Go" icon.

Once a valid case number is entered, simply click on “Go”

Opening a Case/Review via the “History List”

There are three ways to open a case from the Opening window. The second method discussed is the “History List” where the user point and clicks on the case number displayed in the “History List”. The History List is found near the center of the Opening Screen.

Q5i maintains a list of up to ten most recently opened cases, most recent on the top to least recent on the bottom. To open a case from the History List:

- 1 Point and click the Review from the list



	Reviews	Cases
1	00H01101	0900004558-9
2	00206002	0900634958-9
3	01598794	30-989985839
4	00A03001	3R00033615-0
5	01A36455	3098765437
6	00A03048	3008008D71-1
7	00550129	0900896050
8	00H01204	3000093763-0
9	00F01004	0138367748
10	01A10444	3023466778

Opening a Case/Review via the “Open Review List”

There are three ways to open a case from the Opening window. The third method discussed is the “Open Review List” where the user identifies the Sample Month and Profile Type to create a focused subset of reviews from which to select.

From the Opening Screen:

❶ Click on Open Review List icon (leftmost icon).

❷ Enter or select the appropriate Sample and Profile.

(The pull down list will change to reflect valid entries of the Sample and Profile values entered).

❸ Point and click the Review from the pull down list.

The screenshot shows a software window titled "Q5i.1.1 DBi-Engine: jet on vader Worker#". It features a toolbar with icons for file operations, a lock, a printer, a list, a key, a magnifying glass, a plus sign, a refresh, and a green arrow. Below the toolbar, there are two dropdown menus: "Sample:" with the value "01/2001" and "Profile:" with the value "Food Stamps Active". Below these is a table with the following columns: Review, Owner, County, LO, Status, and CaseName. The table contains several rows of data, with the first row highlighted in red.

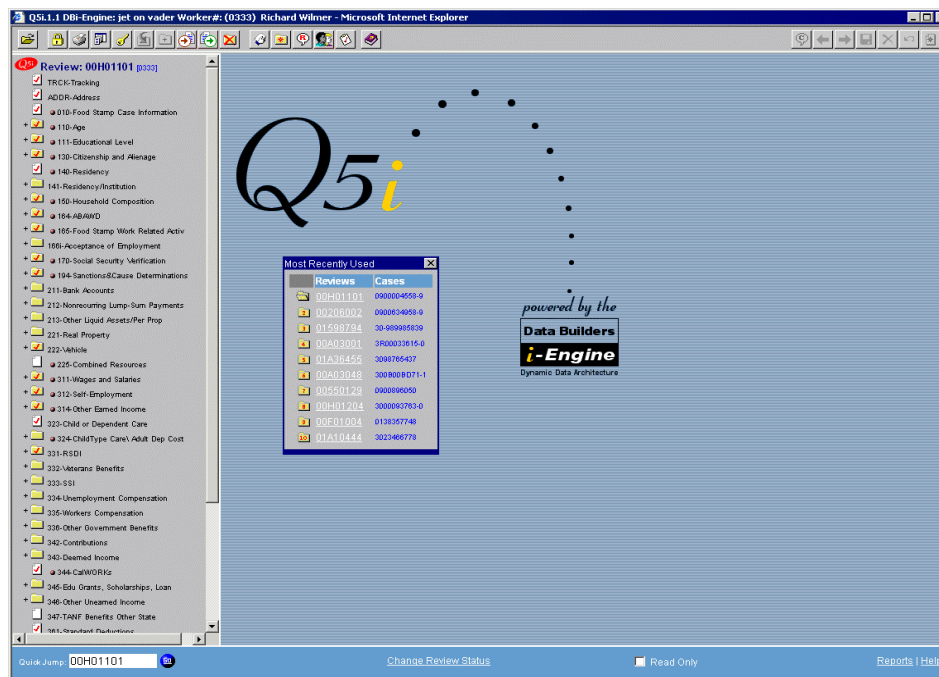
Review	Owner	County	LO	Status	CaseName
00H01101	0333	001		A	HARRIS
00H01102	0333	001		A	GRAYSON
00H01103	0333	001		A	NG
00H01104	0333	001		A	SPIKES
00H01106	0333	001		A	DAVIS
00H01107	0333	001		A	GEER
00H01108	0333	001		A	WINDHAM
00H01109	0333	001		A	LY

Note: Clicking the Open Review List icon will alternately display and hide the Open Review List.

Case/Review Successfully Opened

Whichever method has been used to select and open a case, the result is the same:

Q5i Opening Screen



Regardless of which of the tree methods used to open the case, the History List gets updated to reflect the new order of most recently opened cases.

Navigation Tree - Selecting Classes and People

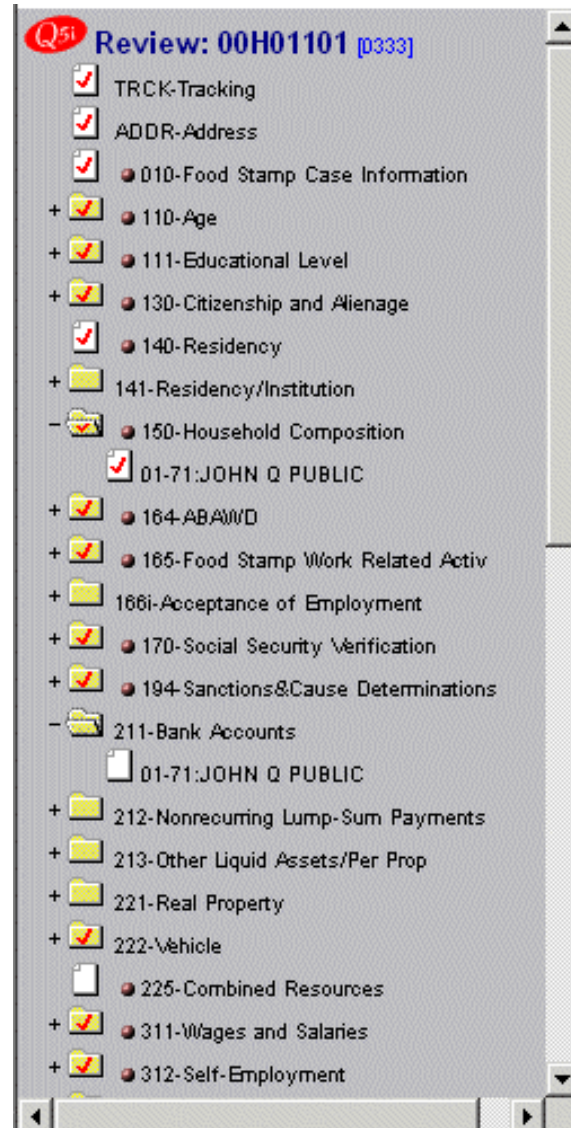
Once you have selected a Review, an Explorer-like tree is displayed on the left side of the screen. From here, one can select which Class or person to bring to the screen by moving the cursor over the desired selection and left clicking .

Navigation "Tree"

Page (with check has data)

Folder (with plus has pages)

Folder (with minus has pages displayed).....
Shaded (Red) entry shows active screen.....



Note: Class numbers preceded with red globes are always required to be completed

Entering Data into Class Items

Typical Class Data Entry Screen (Food Stamps Class 130):

Item Description	Value	Type
130-8025 Gender	02 Female	Code
130-8004 Address/Status/Ref Prog	02 001 Cal/Other Status/Foreign Bn	Code
130-8006 Adult US/Other Status	00 Other	Code
130-8008 Alien Documented		Y/N
130-8009 Type of INS Document		Code
130-8009 Alien Name on Doc (11 DIT)		Large
130-8010 Alien Registration No.		Small
130-8011 INS Section/Visa Admitted		Large
130-8012 Date Lawfully Admitted		MM/DD
130-8013 Expiration Date		MM/DD
130-8015 Identification Document Marked		Large
130-8023 No. Qualifying Emp. Quarters		Count
130-8016 Alien Sponsor		Y/N
130-8017 Needs Aid By Sponsor		Y/N
130-8022 Arrested Before 9-22-80		Y/N

Ways to move the cursor to another field:

- ➔ Move Mouse over the desired field and click
- ➔ Press the Tab key (each Tab moves one field).

Ways to enter data:

- ➔ Once the cursor is in the desired field, type the value
- ➔ Move the Mouse over the folder or calendar icon to the right of the field, click, then move the Mouse over the desired value that displays and click

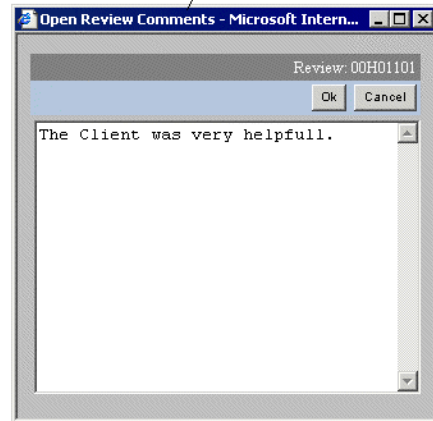
Once a value has been entered and the user makes an action which would normally move the cursor outside the field, the new value gets validated by the system using the definitions set up in the Item's description. If the value is valid - consistent with its definition (ie: a valid code), the cursor moves as directed. However, if the value is invalid an error box pops up giving the user the opportunity to make a correction. Please note that Item validation is not the same as Consistency Edits, which are a separate process run at a different time.

Note: Item Descriptions preceded with red globes are always required while those preceded with green globes are only required if present (ie: a bank account).

Entering Comments at the Review and Class Levels

To enter comments at the Review level:

- 1 Click Red "R" icon

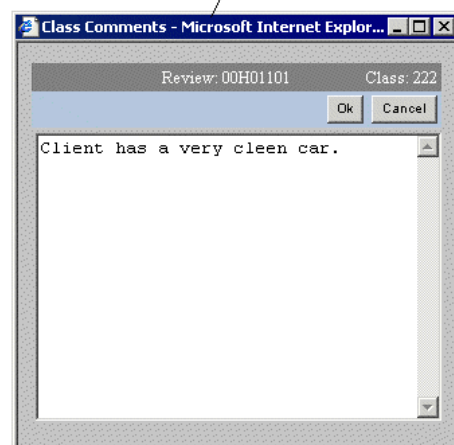


- 2 Enter comment (Maximum of 8000 characters)

To enter comments at the Class level:

- 1 Click blue "C" icon

1



- 2 Enter comment (Maximum of 8000 characters)

Running Consistency Edits

While QCIS validates data entry instantly (eg: dollar amount cannot contain letters), Consistency “Edits”, a more complex type of data testing, is done after data entry is complete. An Edit might be: “If a person is coded as Employed, then there must to be a dollar amount entered in Income Amount”.

There are two type of Edits:

- FATAL** Prohibits a review from being flagged as “Completed”
- WARNING** Does not prohibit a review from being flagged as “Complete”

To run Consistency Edits on the active review:

❶ click on the checked notepad icon.



❷ report will be displayed with consistency edit results

Review: 00H01101
Profile: F1AC

Required Always
Required Always For Persons
Required If Present Classes
Required If Present For Persons

State Edits

Edit	Class	PNNN	Comments
0001	010	0101	Fatal: IF Sample Date Greater Than or Equal To '199910' AND '020-0001' (FS Error Amount/Fed Prog) Greater Than or Equal To '26' THEN '010-0011' (Review Findings/Fed Prog) must be Equal To '2' (Overissuance) or '3' (Underissuance) or '4' (Totally Ineligible) (But it is '1')

Federal Edits

Edit	Class	PNNN	Comments
0083	Federal		Fatal: If 010-0011 (Review Findings/Fed Prog) is 1, then 020-0001 (FS Error Amount/Fed Prog) must be blank or zero. STATE FATAL KCC FATAL (Rev. 6/4/98)
0151	Federal		Fatal: If 020-0001 (FS Error Amount/Fed Prog) is greater than 0000, then 010-0011 (Review Findings/Fed Prog) must be 2-4. STATE FATAL KCC FATAL (Rev. 6/4/98)

Edits have not passed...

Each review can only be returned up the chain of command as “Completed” when it passes all FATAL Edits (report will state “Status has been changed to complete”).

Edits with Links to Case Records

Edits with links to the data (must be mapped) will turn blue when the cursor passes over the edit test. In such a case, clicking while over the blue background will cause Q5i to bring up the record containing the data associated with the error.

- 1 Click when text background is blue
- 2 Class record displays for fast correction

The screenshot shows a software interface with a list of edits on the left and a detailed 'Edit Results (Draft)' window on the right. The window displays a fatal error message for a specific edit.

Edit Results (Draft)

Review: 00H01101
Profile: FIAC

Required Always
Required If Present For Persons
Required If Present Classes
Required If Present For Persons

State Edit

Edit	Class	PNNN	Comments
0001	010	0101	Fatal: IF Sample Date Greater Than or Equal To 1999/10 AND 020-0001 (FS Error Amount/Fed Prog) Greater Than or Equal To 20 THEN '010-0011' (Review Findings/Fed Prog) must be Equal To '2' (Convassance) or '3' (Undensuance) or '4' (Totally Ineligible) (But it is '1')

Federal Edit

Edit	Class	PNNN	Comments
0053	Federal		Fatal: IF 010-0011 (Review Findings/Fed Prog) is 1, then 020-0001 (FS Error Amount/Fed Prog) must be blank or zero. STATE FATAL KOC FATAL (Rev. 6/4/96)

Authorized Rep Not Used

No Payment Amount/Correct

Review Findings/Fed Prog

Review Findings/Fed Prog

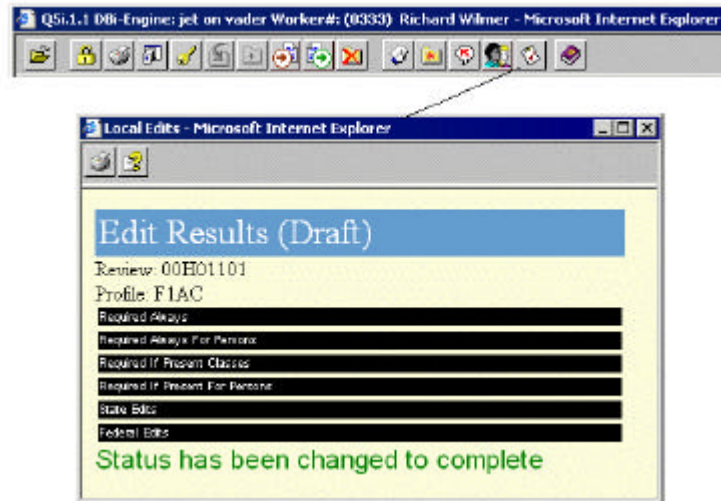
Fed FS Secondary Auth Number

521599

Running Consistency Edit - All Reviews Passed

Before case reviews can be returned up the organizational hierarchy, they must pass all FATAL edits. The Edit report will look like the one shown below:

❶ click on the checked notepad icon (runs Edits and copies verified reviews to the QCIS federal database) .



Note: Message at bottom informs the user that the review(s) in the edit run have passed so their Status value have been set to "B" (complete).

❷ The resulting file can be send back up the organizational hierarchy (they have Status = B).

Sending Cases to Another Q5i User

A review can be sent back up the chain of command when it is complete and has passed all FATAL Consistency Edits (WARNING Edits are permitted).

Reviews are returned via the *Send Reviews* form:

- 1 Click on the icon with the Arrow exiting the Page



Sending	Review	Case	CaseName	County	LO	Status
<input type="checkbox"/>	00F01004	0138357748	Jones	001		B
<input checked="" type="checkbox"/>	00H01101	0000004558-9	HARRIS	001		B

- 2 Select choices and click OK



- 3 Completed task displays message showing number of cases sent.

Notes:

Only Reviews with Status=B can be returned up the chain of command (as completed).

A copy of a case may be sent to another user without the case having passed edits using the "Copy (read only) to Copy (read only)" option. The copied case will be READ ONLY and can not be altered by the receiver.

Moving Q5i Data to Q5R - Making the Transfer File

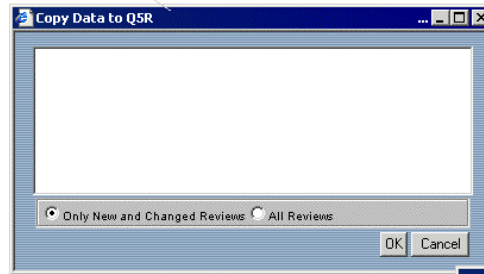
As an interim reporting solution, Q5i will send a copy of its data to Q5R, a reporting-only version of Q5, where the existing Q5 reports and tools can be used. The process involves two steps: 1) Q5i copies reviews to a transfer file and 2) Q5R loads the data from the transfer file.

To move Q5i data to Q5R...

- 1 Click on “copy” icon



- 2 Select one of two options in the Copy Data to Q5R form:



Only New and

Changed Reviews

Only Q5i reviews that changed since the last copy will be sent to Q5R. In this option, Q5R's existing database remains intact and is appended/updated by the incoming Q5i data.

All Reviews

The entire contents of Q5i's database will sent to Q5R. In this option, Q5R's existing database will be replaced by the incoming Q5i data.

Buttons:

OK

Causes Q5i to copy records to a transfer file which Q5 will import. Once data has been written to the transfer file, the form will close.

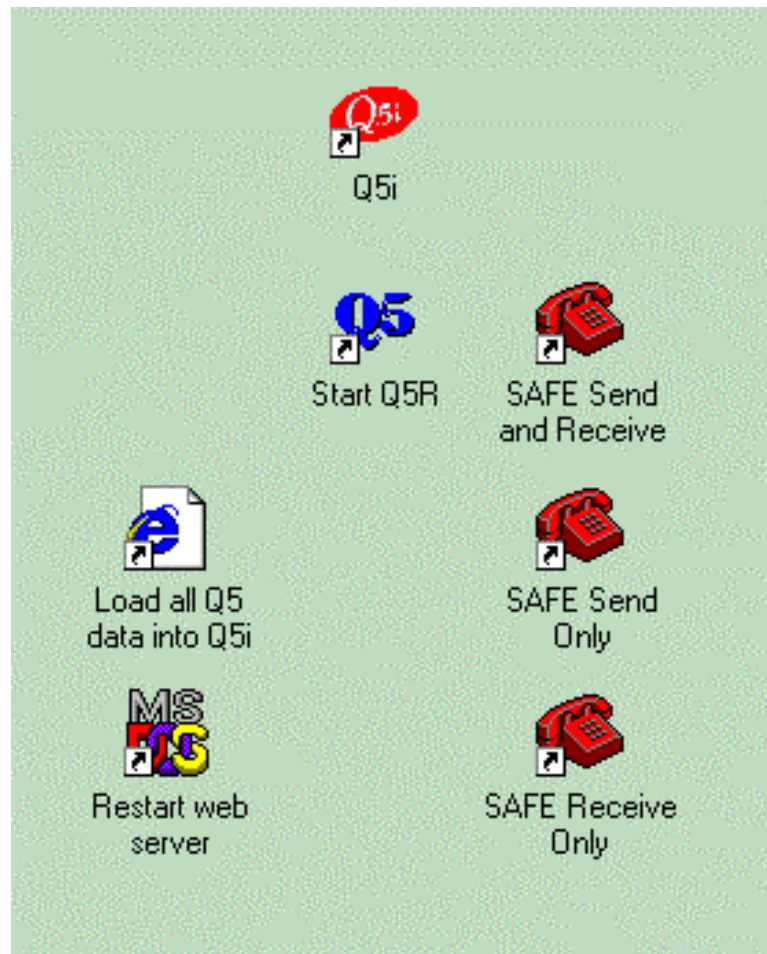
Cancel

Causes the form to close (no data copied)

Once the copy has taken place, “Copy Complete” message displays, the user can exit Q5i and enter Q5R to begin the Q5R import step.

Start Q5R from the Desktop

From the Desktop, double click the blue Q5 (Q5R) icon.

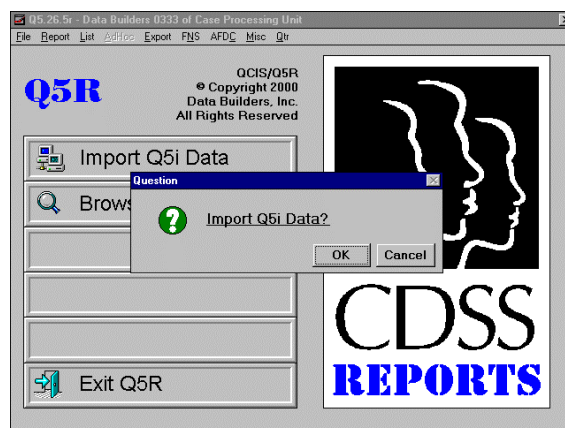


Moving Q5i Data to Q5R - Loading the Transfer File into Q5R

- 1 To move data into Q5R, click on Q5R's Import Q5i Data button (right) to activate the import utility.

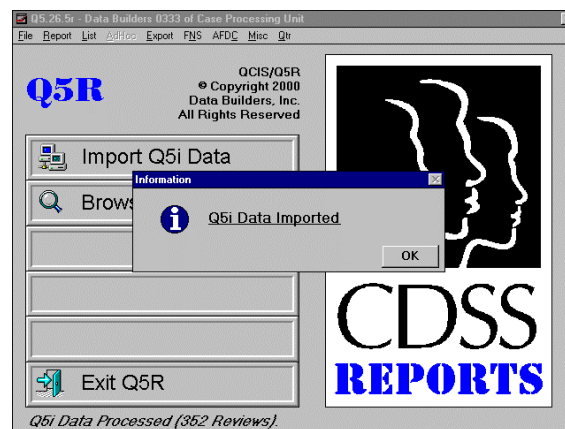


- 2 User must click OK button before the import utility will run. Cancel aborts the process and closes the box.



- 3 When the import is complete, an information box appears so the user knows the import succeeded. User clicks OK button to proceed.

Once the new data is loaded, the user can perform Q5R reporting functions. Please note that existing ad hoc reporting database (create from the ad hoc reporting pull-down) remains unchanged and may need to be regenerated.



Q5R - Running Reports

“Report” Pull Down Menu

“List” Pull Down Menu

“Misc” Pull Down Menu

